



Sport & Media

New consumption patterns

Sebastien Lebreton - Eurosport
Egta's DigitalNext - March 14, Madrid

METHODOLOGY



Online survey



4 major markets – UK, Germany, France and Russia



4,474 respondents aged 18-64 - evenly split across the 4 markets



Fieldwork period: Oct 29th - Nov 2nd 2012



A nationally representative sample was recruited in each market to assess different demographics and sport interest levels, followed by in-depth analysis of a 'sports interested' sub sample



The three phases

We asked respondents to share their behaviour, attitudes and opinions in the three 'phases' surrounding sporting events:



BEFORE

the build up to a sporting event, whether that be hours, days or weeks



DURING

when the event is taking place



AFTER

the period after the event has finished, whether that be hours, days or week



PART1

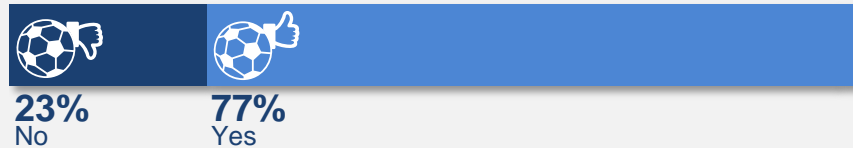
Sport & media in daily life



Sport is an important part of European's lives

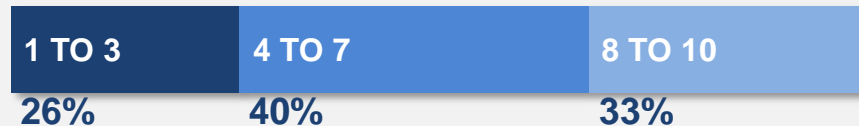
LEVELS OF SPORT INTEREST AND IMPORTANCE

Are you interested in sport?



How important is sport in your life?

(Score from 1 to 10)



85%

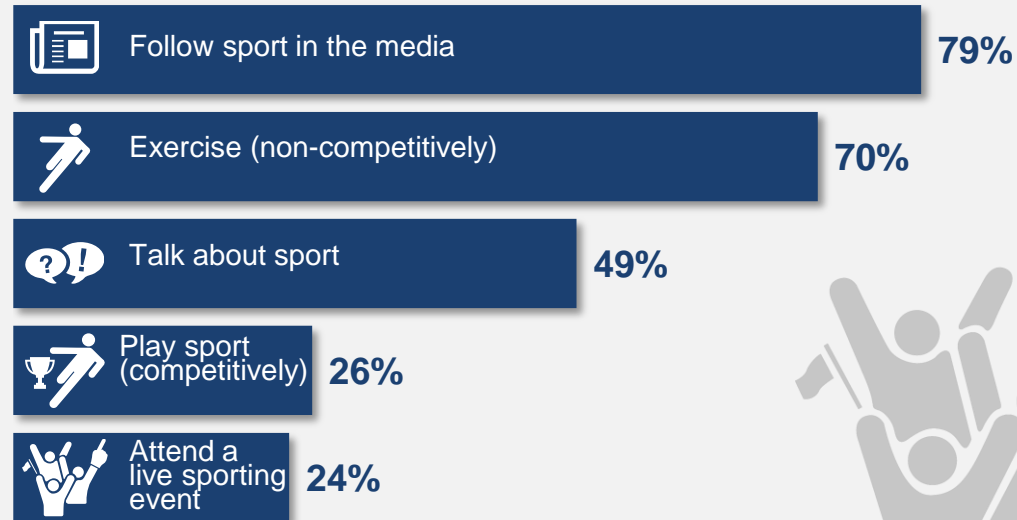
of high earners
claimed to
have an
interest in
sport (index
116)



Three quarters of respondents claimed to have some interest in sport, rising to 85% amongst high income earners. A third rated sport's importance in their lives at 8+

Europeans interact constantly with sport

IN AN AVERAGE WEEK, WHICH OF THE FOLLOWING DO YOU DO?



95%

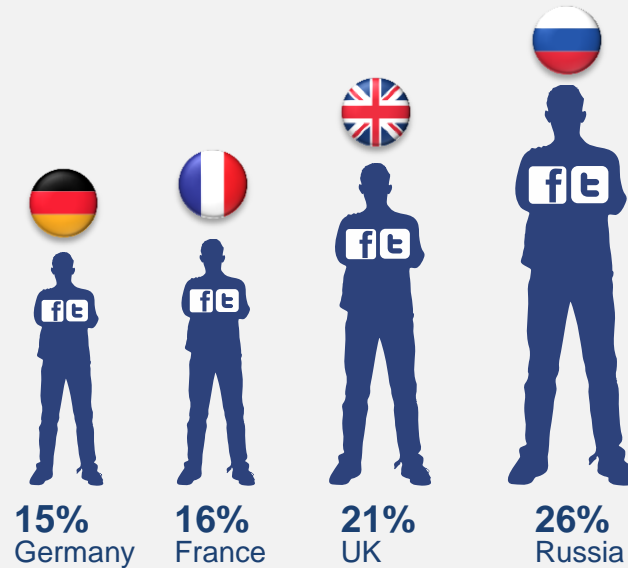
of high earners had experienced a sporting moment in the past 6 months



Sport is ever-present throughout the week

Europeans go social for sport

DO YOU USE SOCIAL MEDIA TO CATCH-UP
WITH THE LATEST SPORT NEWS?



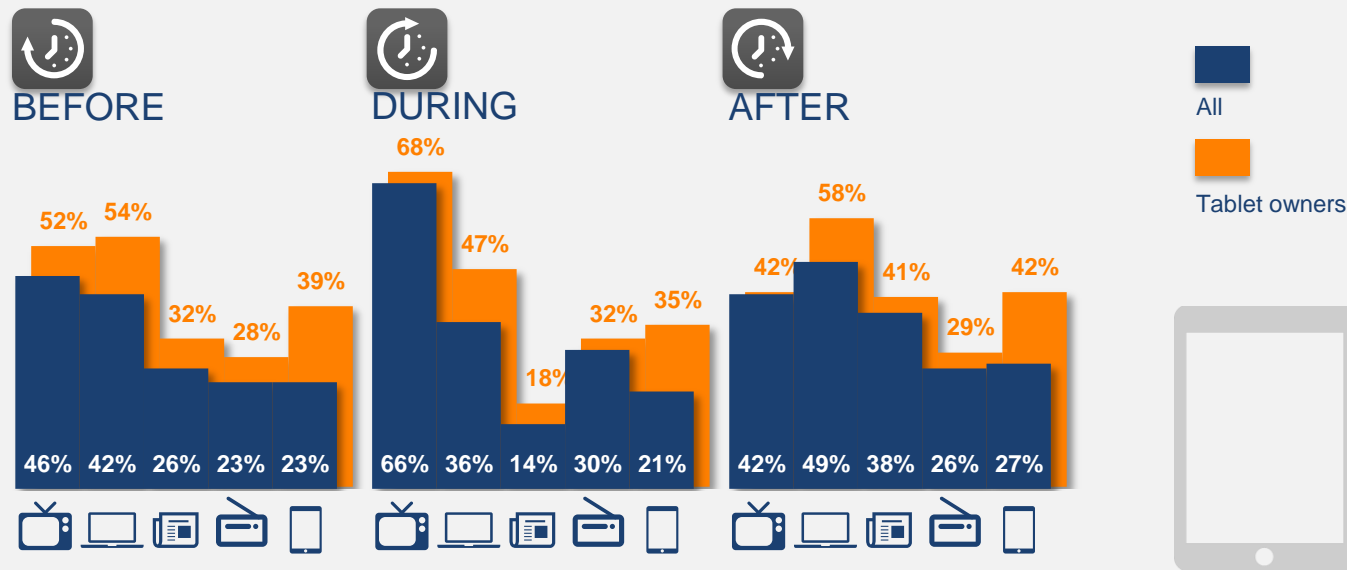
PART2

**Sports media
consumption
patterns
have changed**



Sport media consumption differs, depending on the moment

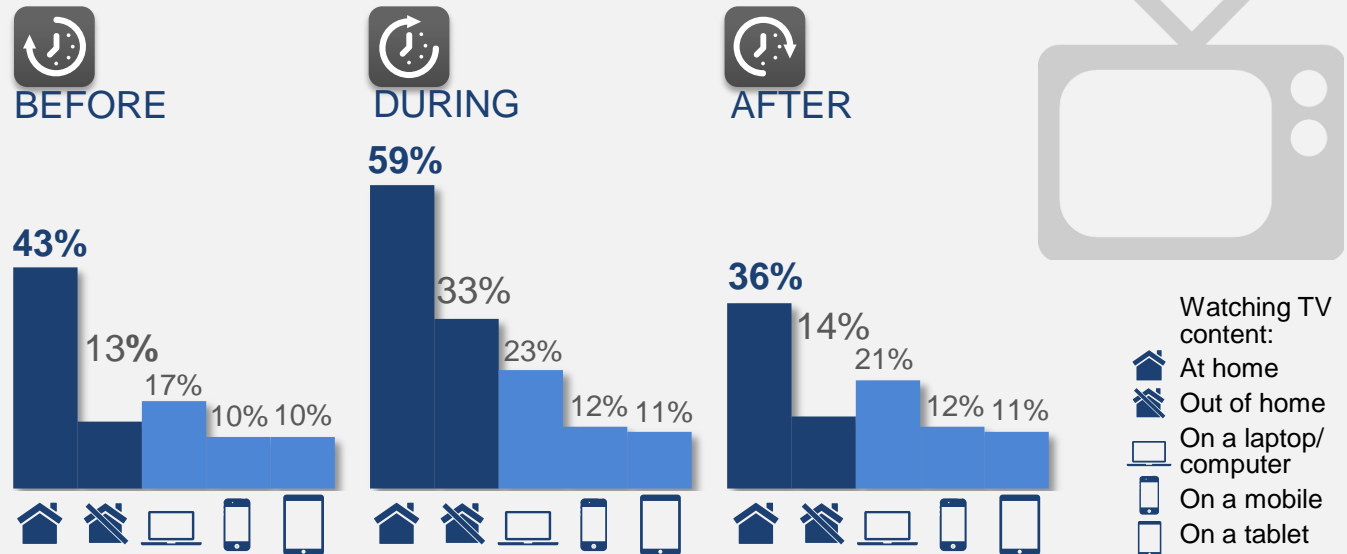
WHICH MEDIA DO YOU REGULARLY USE TO FOLLOW SPORT?



TV is the most popular medium to follow sport before and during events, with the Internet being more prominent in the 'after' phase.

New media broaden opportunity for TV consumption

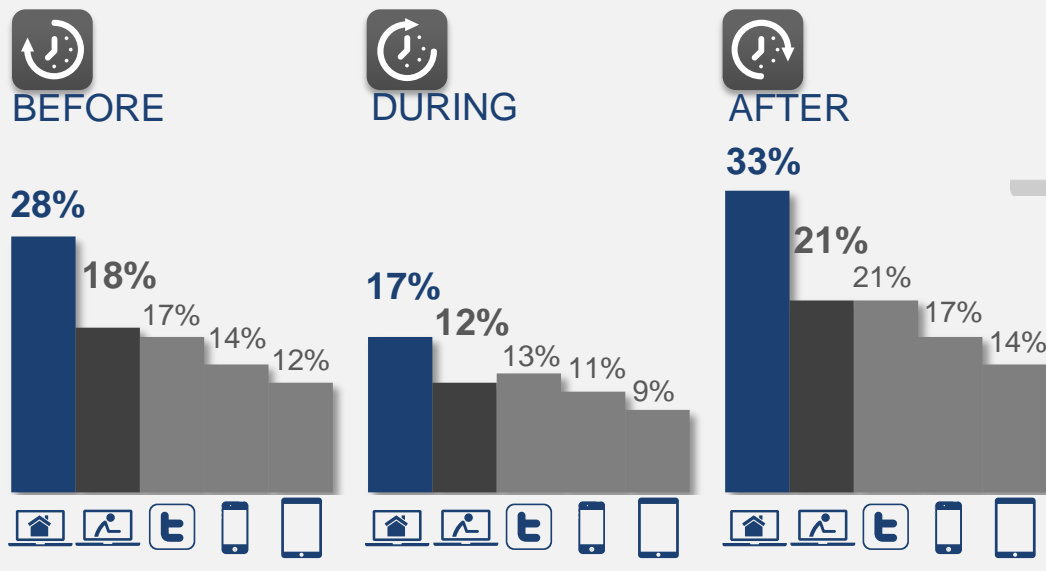
WHICH MEDIA DO YOU REGULARLY USE TO FOLLOW SPORT TV CONTENT?



At home is the most popular means of TV sport consumption
A third of respondents claim they watch TV out of home during sporting events

The Internet has extended opportunities for sport consumption

HOW DO YOU FOLLOW AND INTERACT WITH SPORT CONTENT ONLINE?



Reading about on Internet :



On laptop/comp. at home



On laptop/comp. at work



On social network



On a mobile

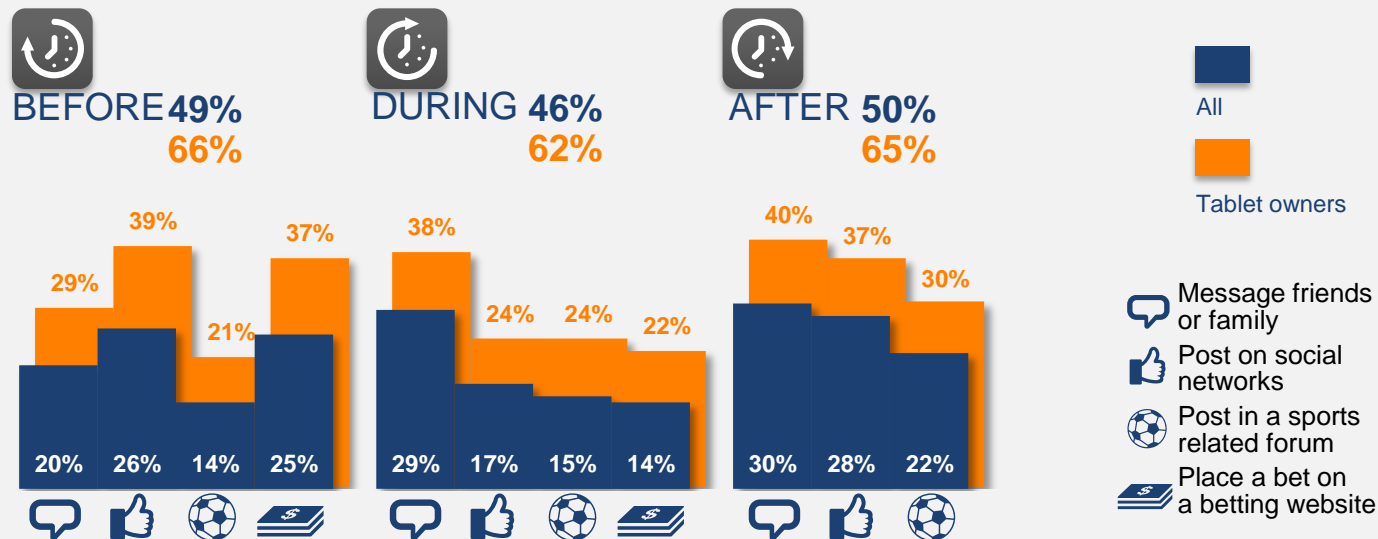


On a tablet

The Internet is used most frequently after sporting events, across a variety of different devices

New opportunities for interaction and engagement

IN AN AVERAGE WEEK WHICH OF THE FOLLOWING DO YOU DO IN RELATION TO SPORT?



Sharing knowledge and opinions around sports events is very important, with more than a quarter posting on social networks before and afterwards.

PART3

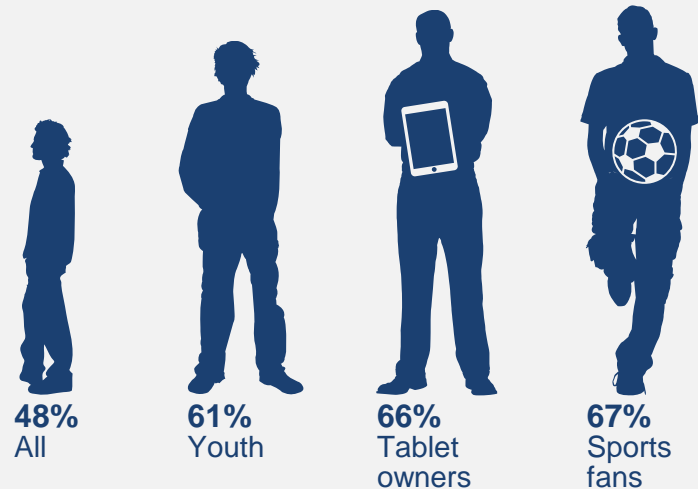
**Sport media
consumption
boosts
multi-screen
usage**



New media devices drive multi-screening

DO YOU EVER USE ANOTHER SCREEN TO INTERACT WITH THE SPORT ON TV?

Ever multi-screen



17%

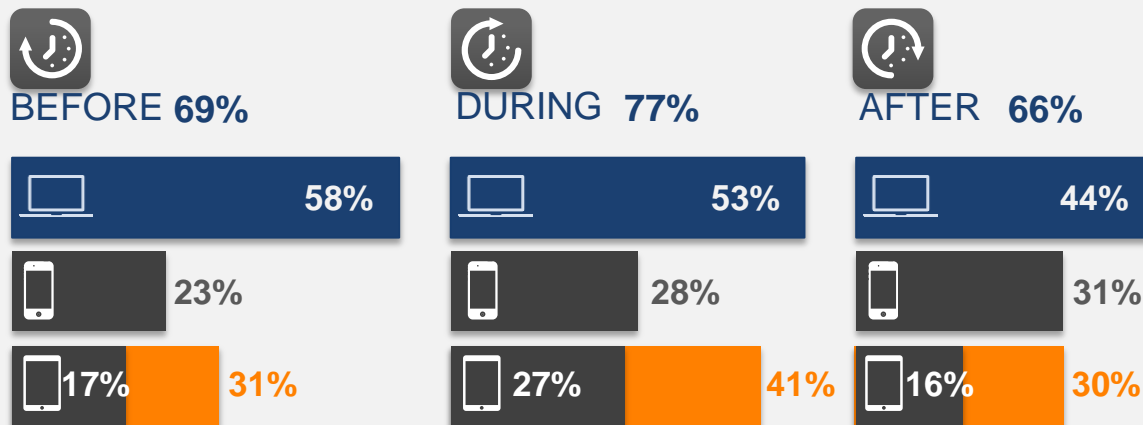
of multi-screener do it every time, compared to 23% of youths and 33% of sport fans



Almost half of respondents multi-screen whilst watching sport on TV.
58% of them do it at least half of the time

Sport viewing is complemented by simultaneous use of other screens

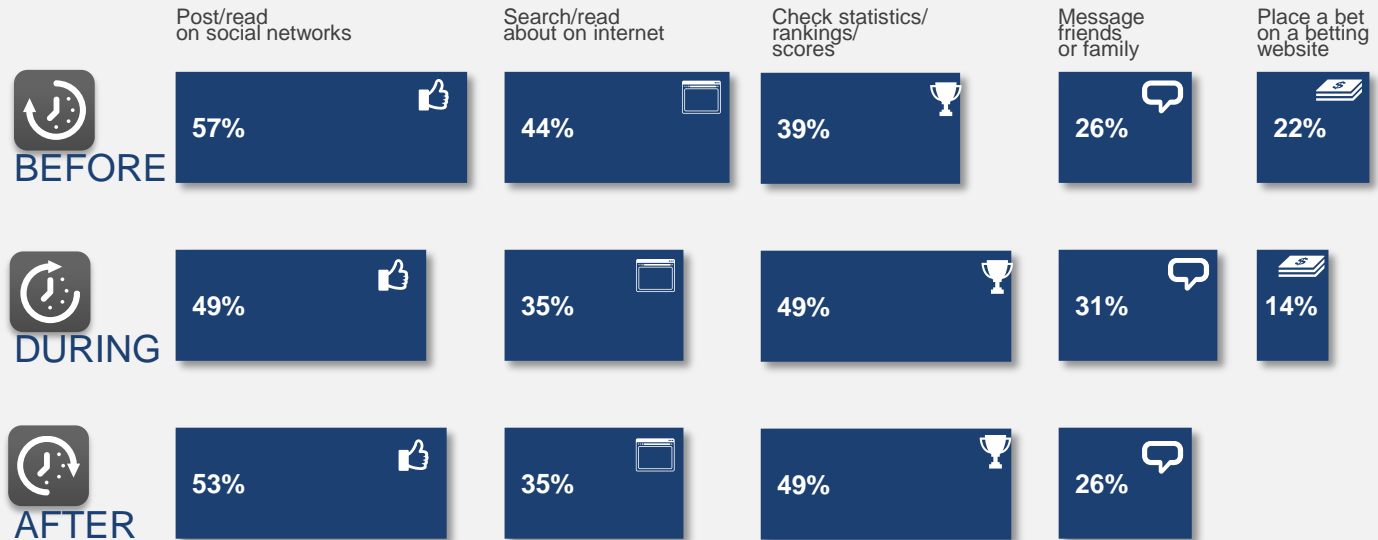
DO YOU EVER SIMULTANEOUSLY WATCH SPORT ON TV AND USE ANOTHER 'SCREEN' TO INTERACT FURTHER WITH THE EVENT?



Multi-screening is common across all the three phases with 'during' being the most popular, suggesting that live sport elicits the greatest need to communicate with others.

This generates consistently high levels of interaction

WHICH OF THE FOLLOWING DO YOU REGULARLY DO WITH ANOTHER SCREEN WHILST WATCHING SPORT ON TV?



The most common multi-screening activity is using social networks, although checking stats is equally popular in the 'during' phase

PART4

**Multi-screening
& online
engagement
build brand
perceptions**

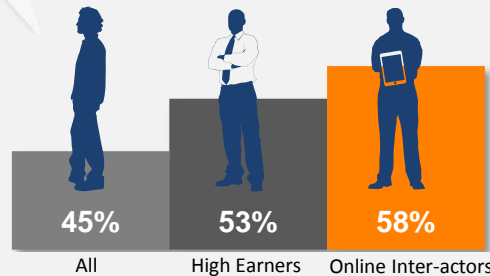


Sport drives positive engagement with associated brands

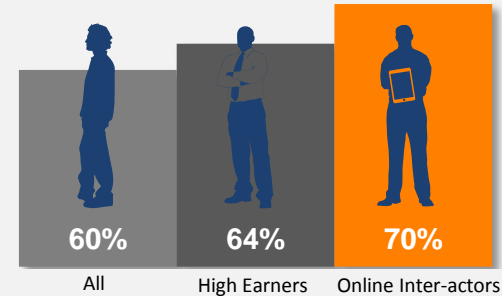
TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS?
- ANY AGREE



I feel more positively towards brands that are involved in sport



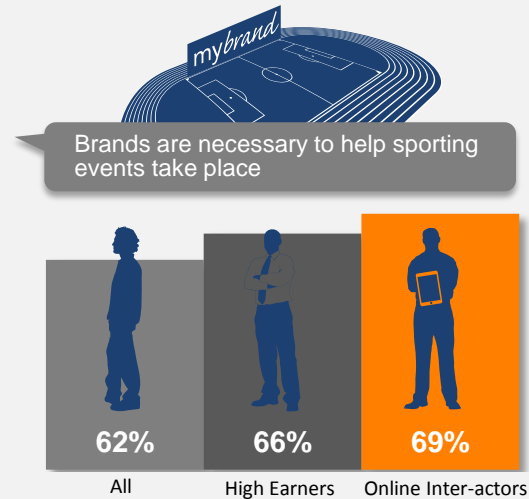
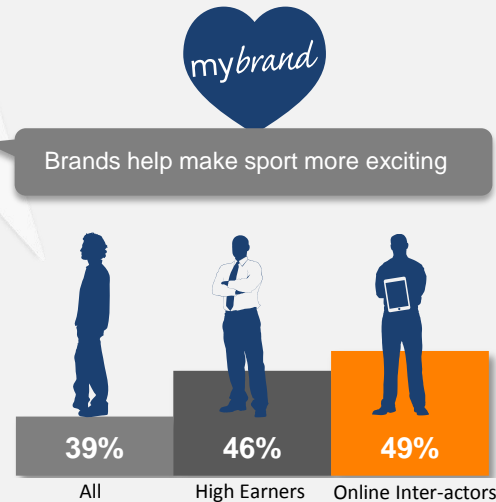
Sponsoring a sport event helps set a brand apart from its competitors



Broad appreciation that advertising is important to the sports industry: Positive sentiment makes sport association a powerful means of brand differentiation

Brands enable events to take place and maintain sport quality

TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS?
- ANY AGREE



Brand investment supports grassroots level sport and enables events to take place; ensuring sport remains exciting and of high quality

Sport fans are great social connectors

APPROXIMATELY HOW MANY PEOPLE DO YOU STAY IN CONTACT WITH IN YOUR PERSONAL LIFE THROUGH THE FOLLOWING MEANS?



Sport fans have more connections. This generates more Word of Mouth around brands.

Summary

Sport plays a key role in Europeans' daily lives, shaping their conversations, media consumption and behaviour

TV remains king of sport consumption and online is prince prior to and after events

Online interaction is particularly significant both before and after sporting events

Multi-screening and online engagement strengthen brand perceptions



This brochure is only a very brief summary of the research project.

More in depth analysis of each area outlined is available, with focus on specific target groups and sectors

PLEASE CONTACT US FOR FURTHER INFORMATION

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